East

L Number	Hits	Search Text	DB	Time stamp
1	187	((enter$4 or input$4) NEAR5 (map or maps)) SAME (touch or ((pen or digitizing) ADJ tablet$1))	USPAT; US-PGPUB; EPO; JPO; DERWENT; IBM_TDB	2003/05/26 11:09
2	0	((enter$4 or input$4) NEAR5 (map or maps)) SAME (touch AND ((pen or digitizing) ADJ tablet$1))	USPAT; US-PGPUB; EPO; JPO; DERWENT; IBM_TDB	2003/05/26 11:07
3	0	((enter$4 or input$4) NEAR5 (map or maps)) SAME (touch or ((pen or digitizing) ADJ tablet$1)) SAME GIS	USPAT; US-PGPUB; EPO; JPO; DERWENT; IBM_TDB	2003/05/26 11:09

SMD

Dialog
5/26/03

```
Your SELECT statement is:
   s CACI and InSite and (fieldforce or field()force)

           Items   File
           -----   ----
               1    13: BAMP_2003/May W3
       Examined  50 files
       Examined 100 files
       Examined 150 files
       Examined 200 files
       Examined 250 files
       Examined 300 files
       Examined 350 files
               1   590: KOMPASS Western Europe_2002/Dec
       Examined 400 files
       Examined 450 files
       Examined 500 files
               1   765: Frost & Sullivan_1992-1999/Apr
       Examined 550 files

   3 files have one or more items; file list includes 552 files.
```

SMD

```
Set     Items   Description
S1          3   CACI AND INSITE AND (FIELDFORCE OR FIELD()FORCE)
S2          2   RD (unique items)
File  13:BAMP 2003/May W3
         (c) 2003 Resp. DB Svcs.
File 590:KOMPASS Western Europe 2002/Dec
         (c) 2003 KOMPASS International
File 765:Frost & Sullivan 1992-1999/Apr
         (c) 1999 Frost & Sullivan Inc.
?
```

—reviewed all

SMD

Dialog
5/26/03

```
Your SELECT statement is:
   s CACI and (fieldforce or (territory()(optimization or optimisation)))
and py<=2001

           Items   File
           -----   ----
       Examined  50 files
       Examined 100 files
               1   148: Gale Group Trade & Industry DB_1976-2003/May 23
       Examined 150 files
       Examined 200 files
       Examined 250 files
       Examined 300 files
       Examined 350 files
       Examined 400 files
       Examined 450 files
       Examined 500 files
               1   765: Frost & Sullivan_1992-1999/Apr
       Examined 550 files

   2 files have one or more items; file list includes 552 files.
   One or more terms were invalid in 103 files.
```

SUD

```
Set      Items   Description
S1           2   CACI AND (FIELDFORCE OR (TERRITORY()(OPTIMIZATION OR OPTIM-
                  ISATION))) AND PY<=2001
S2           2   RD (unique items)
File 148:Gale Group Trade & Industry DB 1976-2003/May 23
         (c)2003 The Gale Group
File 765:Frost & Sullivan 1992-1999/Apr
         (c) 1999 Frost & Sullivan Inc.
?
```

— reviewed all

SMD

2/9/2 (Item 1 from file: 765)
DIALOG(R)File 765:Frost & Sullivan

00561219

PROFILES OF STRATEGICALLY TARGETED COMPANIES: *CACI*: Company Background; Products in the Marketplace; Strategies

Main Title: EUROPEAN GEOGRAPHICAL INFORMATION SYSTEM MARKETS
Pub. Date: October 1998
Source: Frost & Sullivan
Telephone: US (415) 961 - 1000; London 071 730 3438
Word Count: 276 (1 pp.)
Language: English

CACI

CACI (44) 0171 602 6000
CACI House
Kensington Village
Avonmore Road
London W14 8TS
United Kingdom
Company Background

CACI is an international information technology (IT) products supplier, with total revenues of $273 million in 1997. The company's European headquarters is in London and its main GIS markets in Europe are banking, insurance, retail and utilities. Its customers include the UK's Royal Mail, the cable operator, Nynex and a wide variety of banks and retail organisations.

Products in the Marketplace

CACI's main GIS products is InSite. InSite is a marketing GIS application with over 200 users. It provides site location, network planning, media analysis and target marketing, analysis of customers and methods to target new customers. InSite includes specialist marketing application modules covering *fieldforce* planning, catchment generation, customer profiling and branch network planning.

Strategies

CACI believes that its success is largely based on the strategy of backing up powerful technological solutions and specialist marketing databases with the highest quality support and training. *CACI* provides a range of target marketing and location planning consultancy services, which are available to InSite clients to ensure that they are able to use the GIS software effectively.

THIS IS THE FULL-TEXT.

Country: EUROPE
Industry: COMPUTERS AND ELECTRONICS
Company Names (DIALOG Generated): *CACI* ; Nynex
?

2/9/1 (Item 1 from file: 148)
DIALOG(R)File 148:Gale Group Trade & Industry DB

05566336 SUPPLIER NUMBER: 11670663 (THIS IS THE FULL TEXT)
Ugly duckling wants to be a white swan. (increased demand for Circular Distributors's door-to-door services)
Reed, David
Direct Marketing International, n19, p32(3)
Nov, 1991
ISSN: 0264-6226 LANGUAGE: ENGLISH RECORD TYPE: FULLTEXT
WORD COUNT: 1968 LINE COUNT: 00149

TEXT:

WE'RE moving away from being an ugly duckling. We're now a credible cygnet and we want to be a snow white swan. This comment by Nick Wells, Sales and Marketing Director of Circular Distributors in the UK, is as good a summary as any of the state of door-to-door distribution within the direct market industry.

For many years viewed as being full of so many cowboys that the samples and leaflets were probably delivered on horseback, it is the distributors themselves who have been pushing up professional standards, encouraged by a client base eager to take advantage of the media, but shy of its apparently unruly nature.

The cygnet could even turn out to be the goose that lays the golden egg if European data protection makes addressed direct mail a communications dodo - door-to-door will almost certainly take over at least part of its territory.

With this opportunity in mind there have been some considerable developments in the last two years: a concentration of business in most countries into half a dozen large operators, the establishment of proper standards of practice and/or a trade association, and innovations in the ability to target households.

Germany presents probably the most sophisticated market in Europe. Part of the reason no doubt is the country's data protection laws, passed in 1971, which restrict the amount of data which can be held and used for direct marketing. Limited by this, direct mail has not been able to show as great an advantage over unaddressed messages as in other countries, since personalisation has not been as extensive.

According to DDV (German Direct Marketing Association) figures, door-to-door takes (British lb)400 million out of a total spend of 24,000 million for a delivery of 1,700 million items annually.

It has also experienced a real boom over the last decade, jumping from annual growth of 4% to 15%. Arnold Janssen, Director General of distributor Werbeagentur Janssen (one of the top three in Germany) and representative to the door-to-door sub-committee in the DDV, believes this trend still has some way to go. "In the mid-term it will continue to climb, in the long-term I don't know", he said. "The West will probably reach its ceiling, but East Germany will push us on."

Reunification has handed an extraordinary business opportunity to West German marketing services companies - they can now extend into a population the size of The Netherlands which speaks the same language and which also lacks any real service companies of its own.

"Before the borders were open, we went into East Germany," says Janssen. "In the first few months, before any other media in NovemberDecember 90 and january 90, we made deliveries door-to-door." With 75 wagon loads of Western direct mail apparently stuck in a siding in Chemnitz, the ability of door-to-door to build its own distribution networks independent of the overburdened East German Post Office looks likely to win it a major slice of DM activity there.

While Janssen claims market leadership for his company in the East, the West is dominated by five or six major players. The Post Office's own service for unaddressed mail takes the biggest single part of the market with 900 million items a year. Second largest is probably the WVO, with

janssen third, delivering 300 million items.

Nearly 70% of deliveries are leaflets, with samples, catalogues and unaddressed advertising mail taking up 10% each.

While Germany is sophisticated in its structure and levels of professionalism, it also has some major differences to other European industries. The same restrictions on data that inhibit direct mail also limit the ability of door-to-door to target messages to households.

The main segmentation is by financial status, although this is fairly crude, dividing the market into three levels. Characteristics of the house itself, such as whether it has a garden, can also be used.

The distribution companies themselves are separate from free newspaper deliveries and in competition with them, a distinct contrast to the UK and France. But Germany does have the only equivalent of a mailing preference service for households who do not want to receive promotional material in their letterbox in the form of a sticker produced by the DDV that indicates "opting out".

Some 3% of households, equivalent to 10% of the population, use it, which janssen claims indicates a high level of consumer acceptance of the medium.

By contrast, France and the UK contain a wider spectrum of professional standards and service levels, from the excellent to the execrable. For example, according to one industry source 50% of the French door-to-door market is leafleted by black market operations.

The UK has seen a considerable shake out in the last year, helped by the formation of a trade body, the Association of Household Deliverers. This includes arguably the half dozen most significant players, of which Circular Distributors are market leaders with 30% of all distributions at 900 million items annually, and MRM second with 400 million. Mail's Household Delivery Service claims some 600 million items.

The private companies deliver free newspapers as well as promotional activity, but also offer solus and shared deliveries of ad material only that can bring the cost down to as low as 1.5p per item. They reach 85% of households (18.7 million) compared the 100% reach of HDS, with 23 million households finding a postman bearing not just mail but promo literature on their doorsteps.

Perhaps the most critical issue for door-to-door in the UK over the last few years has been worries about dumping of leaflets by distributors. To counter these fears most companies have introduced some form of back-checking, although, as Wells acknowledges, "there are always going to be some problems inherent in the nature of policing a *fieldforce* of 5,000".

HDS has used this as a selling point for its service since it is delivered by uniformed postmen and women for whom dumping of any material, postal and promotional, is actually a criminal offence. But Mike Bingham, head of HDS, acknowledges even this is not a sure-fire guarantee. "You hear anecdotes about bags found in reservoirs," he says.

But the determined efforts to present a professional image seem to be paying off, aided by two major trends: firstly, blanket drops of promotions like newspaper bingo cards are now a thing of the past. Although overall volumes are still climbing, individual campaigns are probably running at anything up to 20% down.

Secondly, targeting is hitting the industry in a big way. As Wells sums up: "Someone who might have done 10 million would do 8 million now. Some are still doing millions, but they are targeting more accurately."

In February CD introduced its own targeting system called Impact Plus, put together in partnership with CCN Systems, that allows anything from broad profiling by TV region down to postcode sector. It is also able to profile the catchment areas around retail outlets. "We are not setting ourselves up as geodemographic specialists," says Wells. "The idea was to make it better for clients by increasing levels of sophistication for targeting and to encourage new users into the marketplace."

It might be imagined that having introduced post codes decades ago to help its own delivery service, the Royal Mail would have been quick to apply geodemographics to its own door-to-door distribution service. But

Bingham admits: "We've been well behind."

However, HDS is rushing to catch up by buying in *CACI*'S Acorn Insight 11 module and appointing its first targeting manager last month.

Bingham also defends the higher cost of HDS - for some drops it can cost F30 per thousand compared to F10 per thousand from competitors by claiming: "Our service is like a BMW compared to their Ford." Certainly the investment being made by his competitors in better systems and distribution methods may well see more premium pricing in the UK.

Targeting has also just hit France with the launch on October I by Delta Diffusion of its Delta Cible service. Designed in conjunction with Coref, it takes National Bureau of Statistics (INSEE) figures which divide the population into 150 socio-economic groups and allows targeting down to 1,500 homes. According to Product Manager Mark Faeyt, the service "will attract direct marketers with problems finding the right lists".

These must exist in large numbers in France since door-to-door is the biggest nontraditional media. Apart from the fringe operators running half the market, a further quarter is done by advertisers themselves. The remainder is mainly in the hands of the French PTT'S Poste Contacte Delta Diffusion (which is owned by France's largest free press company Comareg) and L'Aspire Carillon.

Delta alone drops 2,500 million items a year. Faeyt reports that 4, 8 and 12-page leaflets and mini-catalogues, for example for Ikea, are the biggest category.

As in the UK there has been a concentration of business into the main players. Through its acquisitions, Delta grew by 43% in 1989-90, but Faeyt forsees 10-15% growth for this year. "Non-media direct mail, addressed or not continues to grow to the detriment of traditional media," he said. This will not doubt continue to benefit door-to-door, not least because of its pricing advantage, with a 20 gram item costing 4p in urban areas and up to 5p in rural zones.

While a few European distributors are likely to experience the potential bonanza the Germans have in the new Eastern market, door-to-door could well be poised to become the medium of choice. Aside from data protection issues, public reactions could well play a part in seeing wider use of door-to-door because it does not intrude" through over-use of personalisation.

However, Bingham is cautious about public reactions. "If it becomes more important, we will get lots of flack on waste paper and green issues," he said.

Price will remain an attraction to clients as will the greater flexibility it can offer for sampling, it is really the only viable method to deliver anything from custard to cosmetics (although a new envelope being produced in America that can hold fluids and if squash resistent may boost mail's share of the sector).

And in some markets where the postal service is unreliable on a good day, particularly in Southern Europe, it may prove to be the only way to deliver promotions direct.

One cloud on its horizon is the association with free newspapers. In the few surveys to have been done into the public's perception of direct mail, "junk mail" has proved on further probing to be seen as precisely free press and leaflets arriving with it. But whereas direct mail has to try and entice targets into the envelope, door-to-door material usually arrive unwrapped and are therefore working from the minute they arrive. Recipients have been found to sort it to dispose of it - read and throw away, or file.

One awareness survey showed that promoted recall was greater after four days than immediately after arrival. As one media director observed of door-to-door: "You have to look at it before you bin it." n

SPECIAL FEATURES: illustration; photograph
COMPANY NAMES: Circular Distributors--Services
INDUSTRY CODES/NAMES: ADV Advertising, Marketing and Public Relations
DESCRIPTORS: Direct marketing--Technique; Direct marketing--Services

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